



# User manual for the AddOn Active Directory Synchronisation (ADSynchroisation)

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User manual

CRM-AD-Synchronisation – for Microsoft Dynamics CRM 2011

For version 5.0.0

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## **1. Preface**

Thank you for choosing our Active Directory Synchronisation (AD Synchronisation) for [Microsoft Dynamics CRM 2011](#).

With this service, which has only read access to the Active Directory, you can automatically transfer changes in user records from the Active Directory into Microsoft Dynamics CRM.

It installs quick and easy and allows a customized interface configuration.

In the following pages your will find detailed instructions on installing, configuration and usage.

## 2. Installation

### 2.1. Technical installation requirements

A Microsoft Dynamics CRM 2011 OnPremise version must be installed. The AddOn for the AD Synchronisation cannot be used with an online version of Microsoft Dynamics CRM.

The AD Synchronisation cannot be installed in the Sandbox mode, since in this case, the Plug-In, which carries out the installation, is unable to access the Active Directory.

### 2.2. Rights for installing the AD Synchronisation

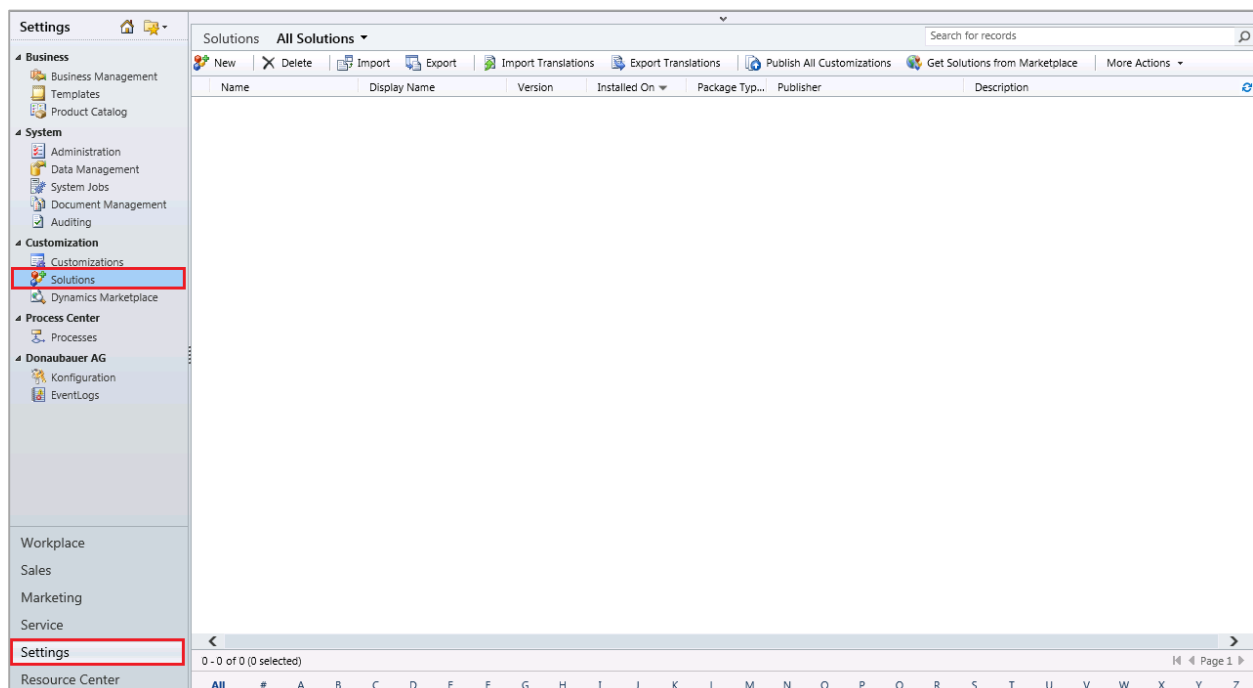
In order to carry out the solution for the AD Synchronisation, the system administrator role as well as the system deployment administrator role is required.

To work with the Microsoft AddOn for the Active Directory, read permissions in the Active Directory of the organization as well as read and write rights in Microsoft Dynamics CRM are necessary.

### 2.3. Importing the solution

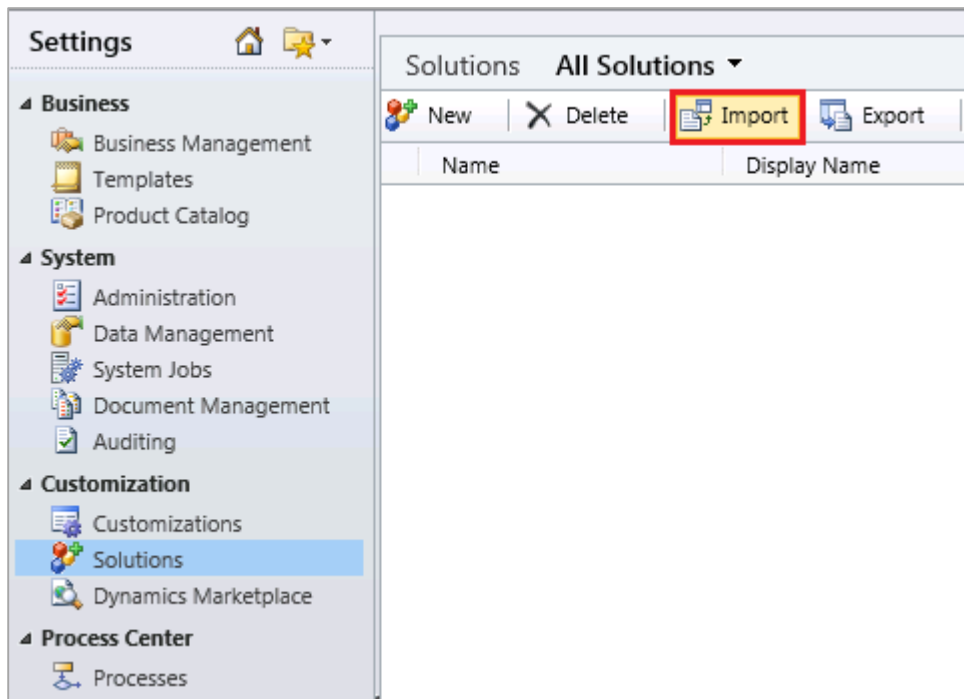
You received a solution from us.

In the sitemap of the navigation area of your Microsoft Dynamics CRM 2011 systems, go to “Settings” and activate the “Solutions” entity in the left application area.

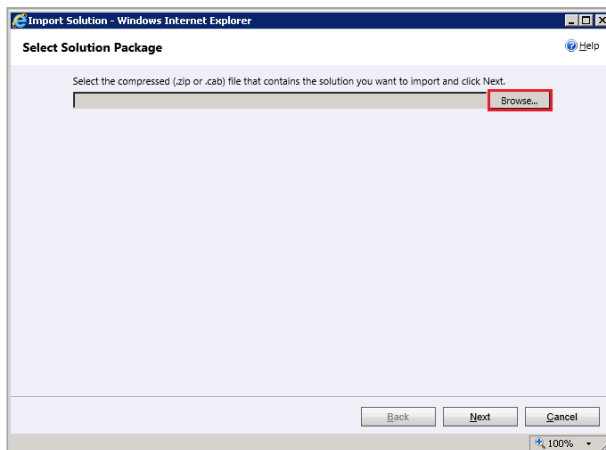


All current solutions of your CRM system are displayed here.

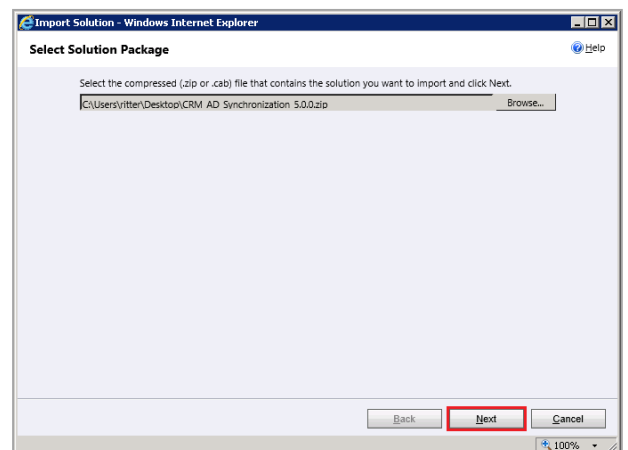
Now, click on the “Import” button in the toolbar.



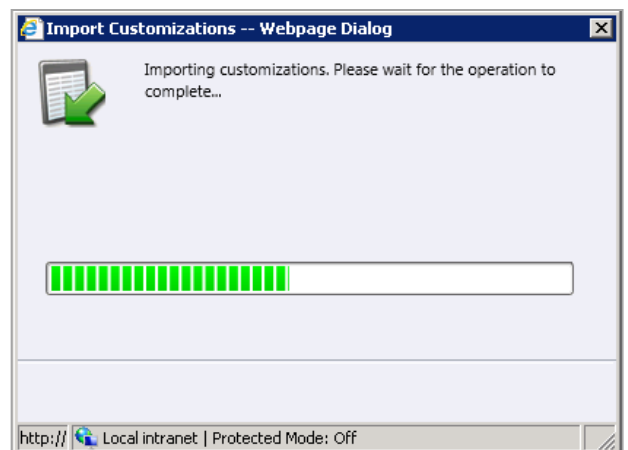
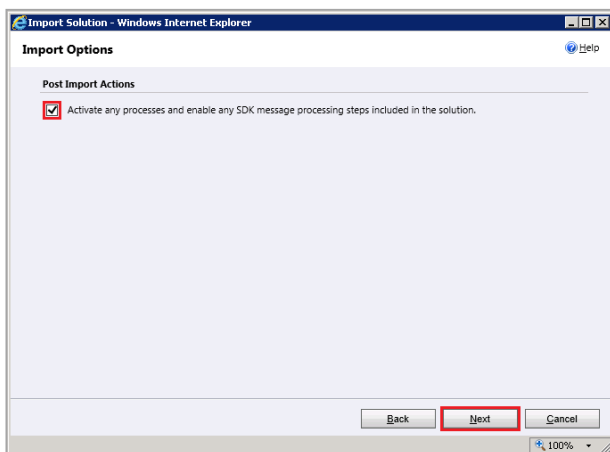
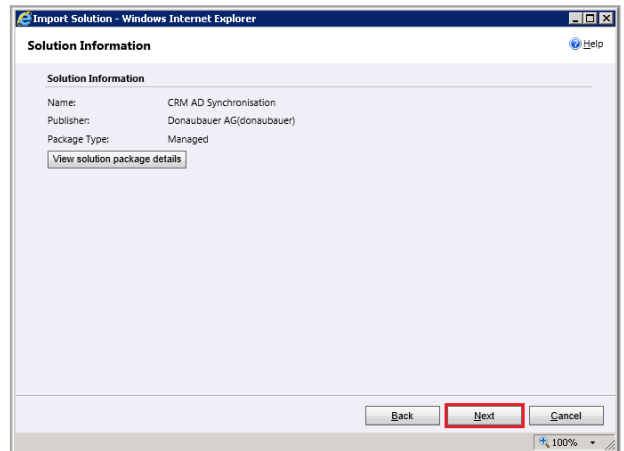
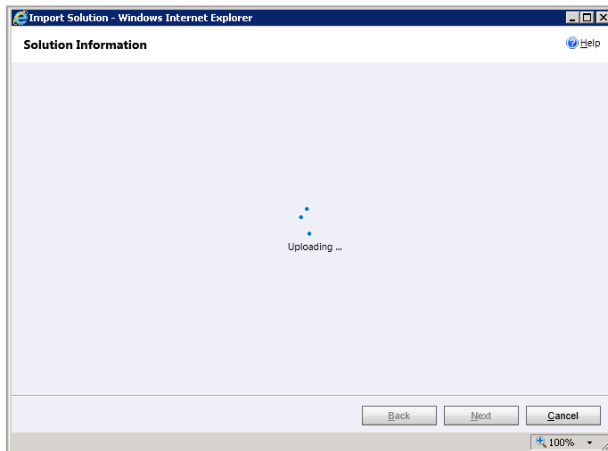
The following window opens up:



Use the “Browse” button and select the storage location of the solution you received from us. Open this solution.

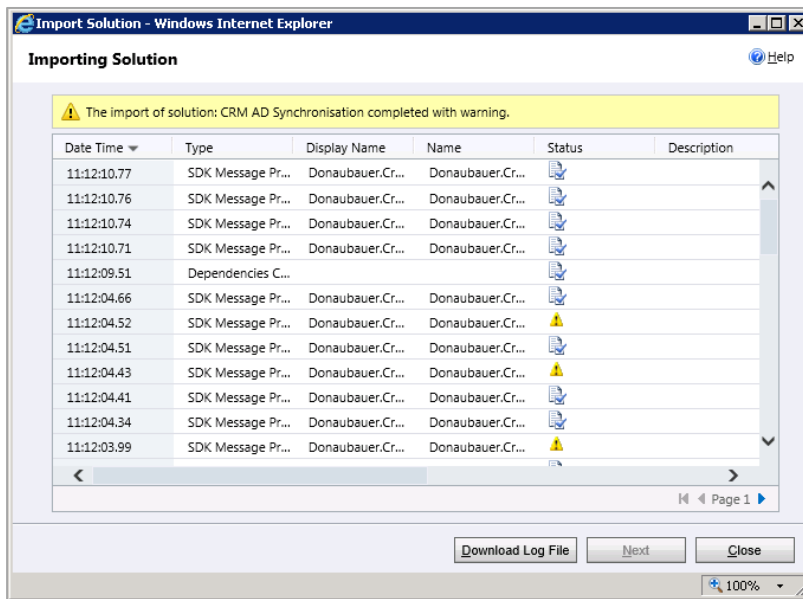


The solution will be displayed in the data field. You may now confirm this and the following windows by clicking on the “Next” button.



In this window, please tick the displayed box for activating all processes and solutions and complete it by clicking the “Next” button.

Now the solution is being imported. This process may take several seconds.



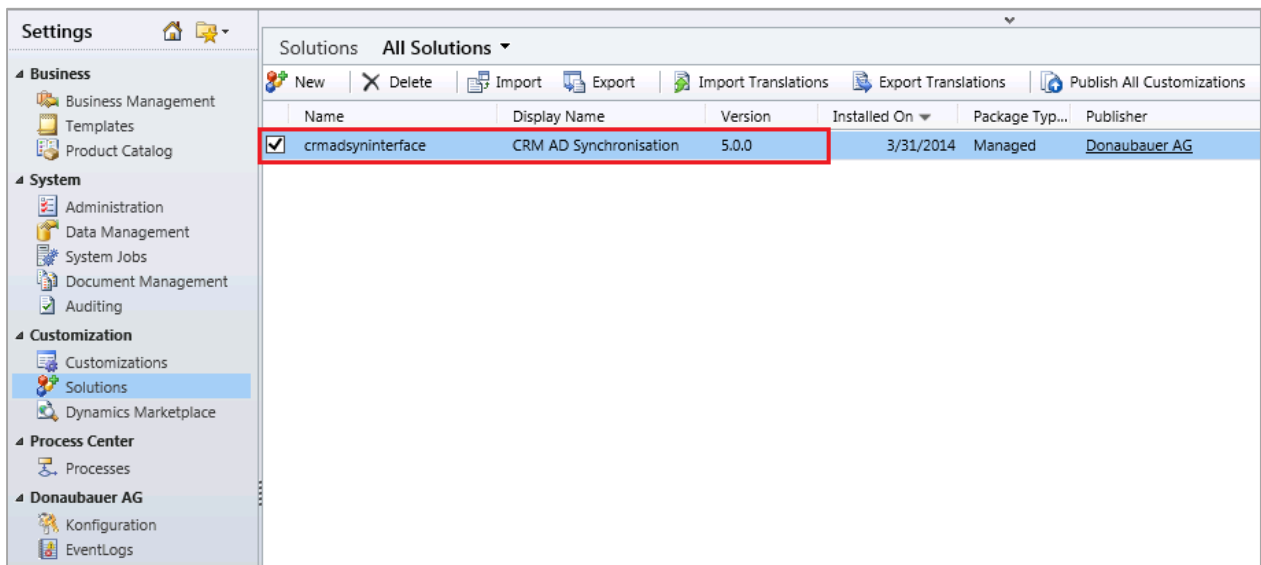
As the installation process is finished, the eventlog opens for checking and information purpose.

If all points listed have a “ticked” item in the “Status” column, the installation has been completed successfully and error-free. You may now conclude the process.

The here displayed screenshot shows a warning message, resulting from the following problem: the interface is available both in German and in English. The CRM, however, is only available in German.

Therefore, these warning messages can be ignored.

An entry named “crmadsyninterface” (name displayed: CRM AD Synchronisation) appears in the CRM system in the “Solutions” entity.

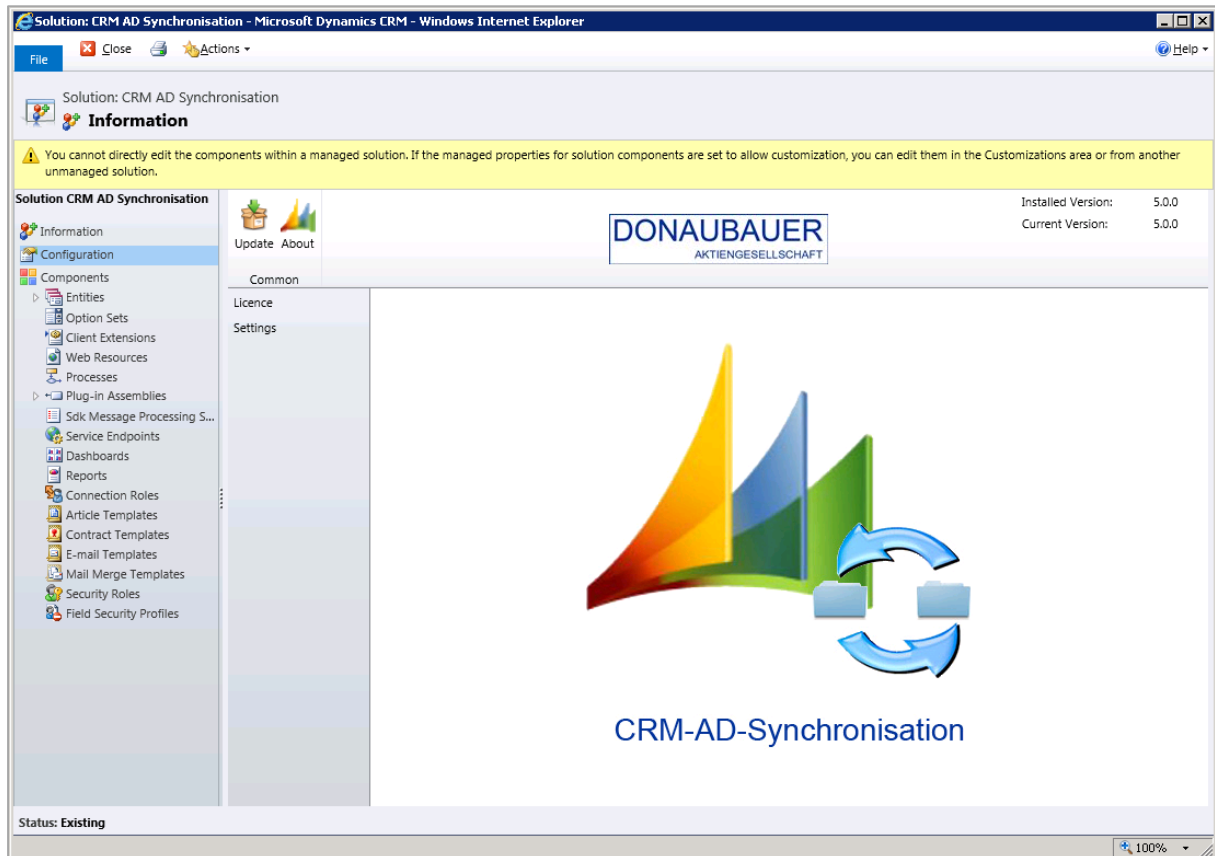


### 3. License request

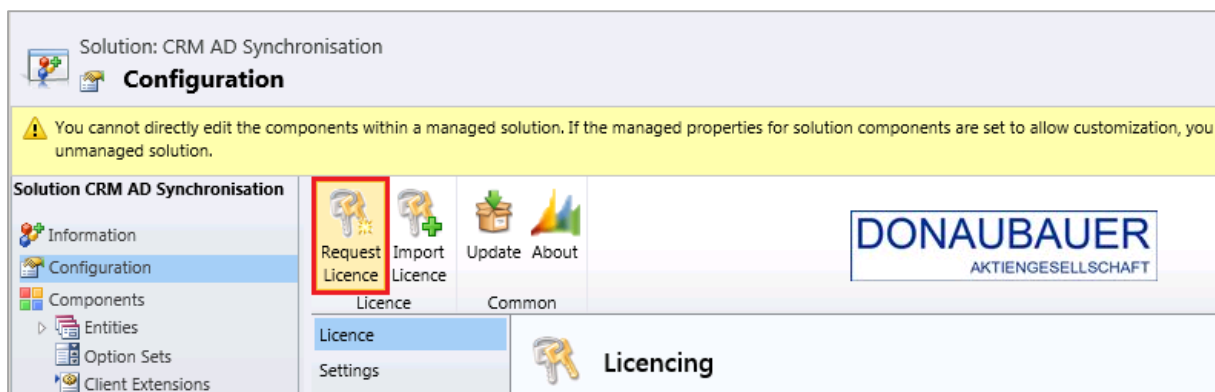
#### 3.1. Automatic license request

Now you need the respective license key for your interface.

Open the imported solution by double clicking on it. The following window appears.



First, click on the “License” button and then click on “Request License”. Now, please follow the instructions of the pop-up window.





Licence Request

Licence Request

To continue you must accept the terms of this agreement. You will then receive a 30 day DEMO license or your full license.

Your E-Mail address\*

max@mustermann.de

<AdSyncInterface>

<orgname>AD Synchronisation</orgname>

<organizationid>84ba784d-8210-e311-a63d-00155d001b27</organizationid>

<version>5.0.0</version>

<users>100</users>

<type>Enterprise</type>

<expirationdate>2014-03-25</expirationdate>

Wichtig!

Bitte lesen Sie vor Installation der Software namens AD Synchronisation für Microsoft Dynamics CRM 2011 diese Lizenzbedingungen aufmerksam durch.

Dieser Endbenutzer-Lizenzvertrag (kurz "EULA" = End User License Agreement) ist ein rechtsgültiger Vertrag zwischen Ihnen (entweder als natürlicher oder juristischer Person) und der Donaubauer Aktiengesellschaft für das Ihnen gelieferte und im vorab genannte Software-Produkt. Durch die Installation und Verwendung dieser Software erklären Sie sich mit den Bedingungen dieses Vertrages einverstanden.

Sollten Sie mit den Bedingungen dieses Vertrages oder Teilen hiervon nicht einverstanden sein, dann brechen Sie die Installation hier ab und geben die Software dem Händler zurück, der Ihnen den Kaufpreis gemäß seinen Geschäftsbedingungen zurück erstatten wird.

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Die dieser Lizenzvereinbarung beigelegte Software darf nur verwendet werden, wenn Sie über eine gültige Lizenz für dieses-Produkt verfügen. Die AD Synchronisation für Microsoft Dynamics CRM 2011 ist Eigentum der Firma Donaubauer Aktiengesellschaft und ist urheberrechtlich geschützt. Der Kunde erwirbt mit dem Kauf der Lizenz das Recht, diese Software zu nutzen. Er erwirbt keinerlei Rechte an der Software selbst oder an der Donaubauer Aktiengesellschaft.

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☒ I accept the terms of this license agreement.

Continue

Cancel

An email address is required for the automatic license request. Additionally, you must accept the terms of agreement.

Licencing

Licenceinfo

Organization Name:

Organization Id:

Version:

Users:

Licencetype:

Expirationdate:

Licencestatus

Licence invalid.

Licencekey not found.

Licencekey

Importing Licence

By clicking on the "Continue" button, the CRM server will connect one-time with our server, which will then transmit the license key to your system.

After the successful import of the license key, the according information will be displayed.

Request Licence
 Import Licence
 Update
 About

Installed Version: 5.0.0  
 Current Version: 5.0.0

Licence

Settings

**Licencing**

Licenceinfo

Organization Name:

AD\_Synchronisation

Organization Id:

84ba784d-8210-e311-a63d-00155d001

Version:

5.0.0

Users:

100

Licencetype:

Enterprise

Expirationdate:

2014-05-25

Licencestatus

Licence valid.

Licencekey

```

PEFKU3luY0LudGvYmFjZT48o3JnbmFtZT58RCBTeW5jaHJvbmIzYXRpb248L29yZ25hbWU+PG9yZ2FuaXphdGlvbmikPj
g0YmE3ODRkLTgyMTAtZT
MxMS1nNjNkLTAwMTU1ZDAwMWlyNzwb3JnYW5pemF0aW9uaWQ+PHZlcnNpb24+N54wLjA8L3ZlcnNpb24+PHVz
ZXIzPjEwMDwvZmVudHlwZT48ZmF0aW9uaWQ+PHZlcnNpb24+PHVz
RW50ZmVudHlwZT48ZmF0aW9uaWQ+PHZlcnNpb24+PHVz
dHViPjVhYXNjaW9uaWQ+PHZlcnNpb24+PHVz
Job1JZakNoWFJhZGhFZmF3TnZ4VXpJb3ZUSzZmMHpqQW1NS1B2eG1wbVzNzFeG9cQkVla2dWYkhweijMxZ0VabW
ZLVENYcFZMZDVubmQY2Y3BjUUM2
T1RnU2crUTiFaFFsk2cndngvUEinMUZSajVSeWdCTIINTm0zStc0WIB6OU9oSHBa5HBudzRpZIM0V2xY2OM0aDeYblFw
MGZkaVd4alhY2EZNGVZSW
ZSQStiVjhwZWZGhpsMVfHoms2K2RNakpDbUdMaFnyMIRaUmxSZmQwRU9KTIF4VFRNMdtdbG1uVFjYVWjZBazBHL
zV4Y2ZHQkc1MGdUTzNMZUvobUkw
qjLHYZCnN8MYIZIU045dXl6QkoydHQ3NzRmMk9pUWwHeHM452JIZHR6Y1FQXpZRUic1Vyd1MzckE2Y1NuYzdmS
nd4L3ZSUZ0TVhBMVhOQ3dSVH
JSRVpNQk1vTytdV21qMVNudzQ2NnNSR1p3TFVxdEVPWEFmUFYwbyTST8Eb2FkSxdlWnVadVpYK0ZU1QyWGNJZF
3QUprTURqcm03d1RTUEc3dNN
TjNYNFJSOW01a05mTkNmWFNzN3RQRXo1cUJ2eUVRUFJTSHVrbVJHJUNHMHiWERmdFZVWVQOWS5Uld3eld5Z2x
qbWltTGFTYU9zeRjU1hwU3VjQj
FvK2NIINjEwS2dReHjU1VYZnIHMDJNajZsZ2ZIMXlmcWhCekptTUIzMmlrbk54R3M1UTNWNbFFwZlXxc1NMenc3Yk1ac
kZqWGXrNThFcDfUODAXTEs0
K1JQQ2ExV0ILWkZxc0Z5NkloaGhkbU80TzdpVnB8Ld3Z2SlpmZ2g0ZFdhbGlySVdNWN92M1M4ly9lNWp2YjYvRvowwWZ
3PTwvU2lnbmF0dXI+PC9BZGF
N5bmNjbnRlcmZnY2U+
```

## 3.2. Request a license without internet connection

If the CRM server cannot connect to the internet, the following window will appear after clicking on the “Request License” button.

In this case, please send us the displayed information via email to [lizenzen@donaubauer.com](mailto:lizenzen@donaubauer.com).

With this information, we can generate your license, which will be sent to you immediately via email.

After receiving the license key from us, you need to import it into your system.

To do so, again open the imported solution of the AD Synchronisation interface and click on the “License” button and enter the license key in the right field. Now, click on the “Import License” button.

EULA

EULA

To continue you must accept the terms of this agreement. If you do not want to accept the Software License Terms, close this window and delete the solution.

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Mit dem Erwerb dieses Software-Tools sind Sie berechtigt, eine Kopie des Produktes für eine CRM-Organisation zu installieren, zu verwenden und für eine beliebige Anzahl von CRM-Usern dieser Organisation zur Verfügung zu stellen. Die technischen Voraussetzungen für eine fehlerfreie Installation der einzelnen Versionen des Produktes entnehmen Sie bitte der entsprechenden Dokumentation.

2. Kostenlose und Test- und zeitlich begrenzte Versionen

Die kostenlosen Demo- und Testversionen werden ohne Garantie und Gewährleistung zur Verfügung gestellt. Installation und Nutzung erfolgen ausschließlich auf eigene Gefahr und Verantwortung.

Bei zeitlich begrenzten Versionen wird die Software nach Zeitablauf automatisch deaktiviert und funktionsunfähig, und Sie haben keinen Anspruch auf Bezug von Funktions-Updates für das Produkt, es sei denn, Ihre Nutzungslizenz für die Testversion wird verlängert.

☒ I accept the terms of this license agreement.

ContinueCancel

The following window displays the end user license agreement, which you accept by installing the AD Synchronization together with the Donaubauer AG. Please read this agreement carefully before continuing the software installation. You can accept the terms of the license agreement, if you agree with them.

After importing the solution, the fields of the "Licenceinfo" were filled automatically with the current data of your license key.

Request Licence

Import Licence

Update About

Licence

Common

Installed Version: 5.0.0

Current Version: 5.0.0

Licence

Settings

Licencing

Licenceinfo

Organization Name:

AD Synchronisation

Organization Id:

84ba784d-8210-e311-a63d-00155d001

Version:

5.0.0

Users:

100

Licencetype:

Enterprise

Expirationdate:

2014-05-25

Licencestatus

Licence valid.

Licencekey

cnNpb24+NS4wLjA8L3ZlcnNpb24+PHVzZXJzPjEwMDdwdWwXNlcnM+PHR5cG

U+

RW50ZXhwcmlzZTtvdHlwZT48ZXhwaXJhdGlvdGhvdGU+MjAxNC0wNS0yN

TWwZXhwaXJhdGlvdGhvdGU+PFNpZ25hdHVyPjVHcXJasGVRCUcwSVJBYn

Job1JZakNoWFJhZGhFZmF3TnZ4VXpJbztU5ZzhMWHpQW1NS182eG1wbV

VzNzFleG9qKkVla2dWYkhwejMxZ0VabWZLVENYcFZMZDVubmQ2Y3BUU

M2

T1RnU2crUTIFaFFsk2cwndgvrUElrMUZSajV5eWdCTIINTm0zStc0WIB6OU9oS

HBaSH8UdzRpZIM0V2xYZ0M0aDEyblFwMGZkaVd4alhY2E2NGV2SW

ZSQStiYjhwZWZGoHpsMVFnbs2K2RNakpDbUdMaFNyMIRaUmx5ZmQwR

U9KTF4VFRNMDDl0Gu1vFJYwJZBaz8HLzV4Y2ZHqKc1MGdUTzNMZUvpvU

kw

gjhLUHZCnNBMYIZ1U045dXl6QkoydHQ3NzRmMk9pUWwHeHM4S2JZHRY

1IFQXpZRUic1Vyd1MzckE2Y1NuYzdmSnd4L3ZSQZoTVhBMVhOQ3d5VH

JSRvPnQk1vTytDV21qMVNUdzQ2NnNSR1p3TFVxdEVPWFmUFYwbythSTB

Eb2FkSxdWnVadVpYK0tZU1QyWGIJNZFl3QUprTQRqcm03d1RTUEc3dINN

TJNYNFJ5OW01a05mTkhmWFnzN3RQRXo1cUu2elVRUFJTSHVRbVJHujNH

MHtWERmdFzrVWQwOW5GUld3eld5Z2xqbWlxTGFTYU9zekRjU1hwU3VJQj

FvK2NiNjEwS2dReHjNt1VYZnHMDJNajZS2ZIMXlmcWhCekptTUIzMMlrk5

4R3M1UTNWbFFwZl0Xc1NMenc3Yk1ackZqWGXrNthFcDFuODAXtEs0

KUJQq2ExV0ILWkZxc0Z5NkloaGhkbU80TzdpVnLd3Z2SpmZ2g02FdhbGIYS

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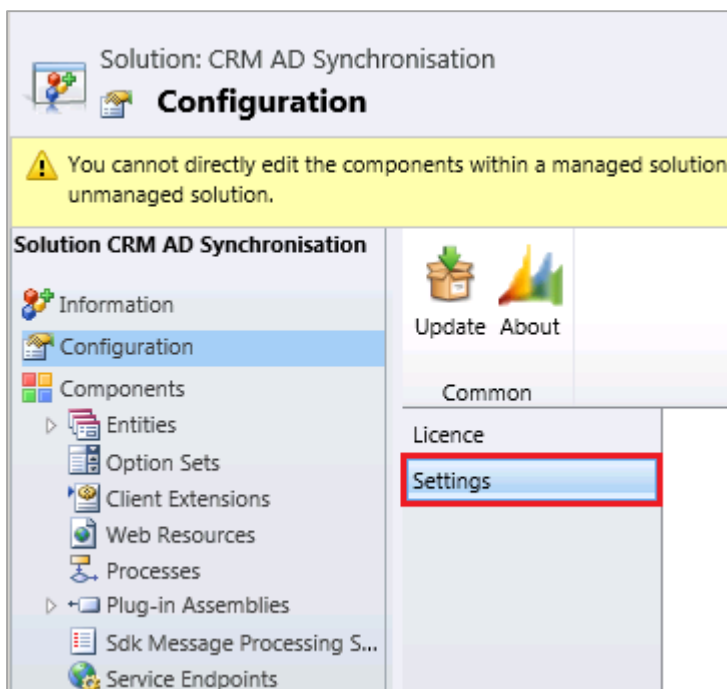
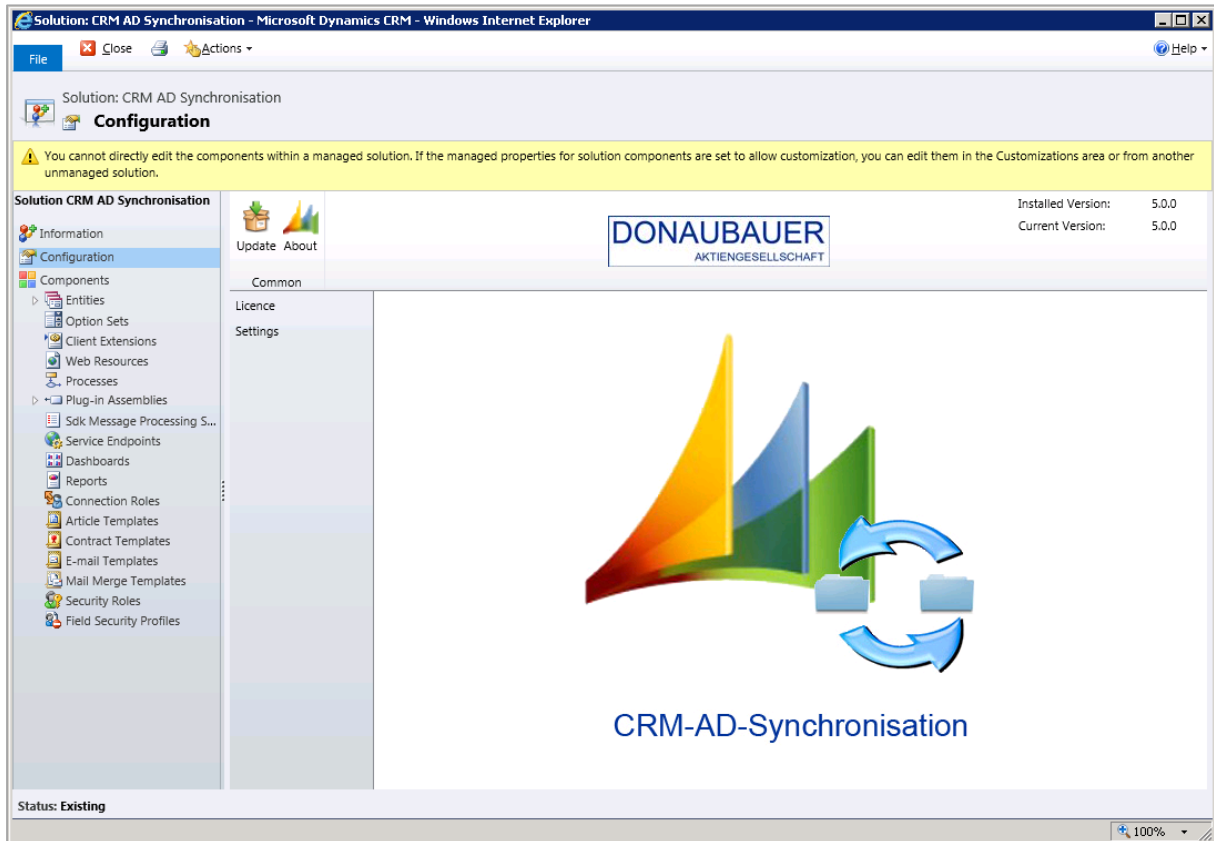
NSbmNlbnRlcnZlY2U+

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Donaubauer Aktiengesellschaft, Wurzener Straße 10, 04774 Dahlen/Sa., Tel.: +49 (34361) 826-0, Fax: +49 (34361) 826-25, [www.donaubauer.com](http://www.donaubauer.com)

## 4. Configuration of the settings

To configure the interface, open the imported solution as in the image below.



Now, go to "Settings" in the SiteMap and in the following window you may carry out the necessary settings.

## 4.1. The Log Level

The Log Level defines which messages are recorded. The recording takes place in the “Eventlog” entity. You may select from the following options:

- |             |   |
|-------------|---|
| Off         | - No messages are recorded.                 |
| Error       | - Only error messages are recorded.         |
| Warning     | - Error messages and warnings are recorded. |
| Information | - All messages are recorded.                |

As a standard, we recommend to set to “Error”.

The screenshot shows the 'Settings' window with a 'Logging' section. The 'Log Level' dropdown menu is open, showing four options: 'Off', 'Error', 'Warning', and 'Information'. The 'Error' option is selected and highlighted. To the right of the dropdown, there is a text box explaining the Log Level setting and a list of the possible options with their descriptions. Below the Logging section, there are sections for 'Tracing' and 'Synchronization'.

Settings	
Logging	
Log Level	<div>The Log Level setting controls the types of messages being logged. Messages will be written to the eventlog entity. The possible options are:  Off - No messages are logged. Error - Only error messages are logged. Warning - Error and warning messages are logged.</div>
Tracing	
Tracing Level	<div>Tracing is used to gather detailed information for debugging purposes. The Tracing Level setting specifies the level of detail.</div>
Synchronization	
E-Mail recipient id	<div>E-Mail recipient ID: ID of the user, who serves as the recipient of the notification email of the AD synchronization. The notification email will be sent automatically.</div>
Test mode	<div>Test Mode: Test mode allows it, to perform the program without making any changes. The CRM user record remains unchanged.</div>
activate Users	
deactivate Users	

## 4.2. Das Tracing Level

With tracing, detailed data for an error search can be collected.

By setting the tracing level the degree of detail can be determined: the higher the tracing level, the more information are collected.

Here are the possible options:

- |   |  |
|---|--|
| 0 | – No details are recorded.                               |
| 1 | – short details for orientation purposes are recorded.   |
| 2 | – All significant details of the functions are recorded. |
| 3 | – All events are recorded.                               |

As a standard, we recommend to set the tracing level up to “3”.

The screenshot shows a 'Settings' window with three main sections: Logging, Tracing, and Synchronization. The 'Tracing' section is highlighted with a red box around the 'Tracing Level' dropdown, which is set to '3'. The 'Logging' section shows 'Log Level' set to 'Error'. The 'Synchronization' section shows 'E-Mail recipient id' as 'E7415D37-8510-E311-A63D-00155D001B27', 'Test mode' checked, 'activate Users' checked, and 'deactivate Users' checked. To the right of each section is a descriptive text box with expand/collapse arrows.


Section	Setting	Value	Description
Logging	Log Level	Error	The Log Level setting controls the types of messages being logged. Messages will be written to the eventlog entity. The possible options are: Off - No messages are logged. Error - Only error messages are logged. Warning - Error and warning messages are logged.
	Tracing Level	3	Tracing is used to gather detailed information for debugging purposes. The Tracing Level setting specifies the level of detail.
Synchronization	E-Mail recipient id	E7415D37-8510-E311-A63D-00155D001B27	E-Mail recipient ID: ID of the user, who serves as the recipient of the notification email of the AD synchronization. The notification email will be sent automatically.
	Test mode	<input checked="" type="checkbox"/>	Test Mode: Test mode allows it, to perform the program without making any changes. The CRM user record remains unchanged.
	activate Users	<input checked="" type="checkbox"/>	
	deactivate Users	<input checked="" type="checkbox"/>	

### 4.3. The Synchronization

#### 4.3.1. Email recipient ID

The “E-Mail recipient id” field is filled with the GUID of a CRM user.  
This user serves as recipient of the automatically generated notification email of the AD Synchronisation. *(For further information on the email notification see item 5.3)*

The user should have stored an email address in CRM, otherwise the email cannot be sent.


**Settings**

**Tracing**

Tracing Level

Tracing is used to gather detailed information for debugging purposes.  
The Tracing Level setting specifies the level of detail.

**Synchronization**

E-Mail recipient id

E-Mail recipient ID: ID of the user, who serves as the recipient of the notification email of the AD synchronization. The notification email will be sent automatically.  
  
Test Mode: Test mode allows it, to perform the program without making any changes. The CRM user record remains unchanged.

Test mode
☒

activate Users
☒

deactivate Users
☒

**Field mappings**

Field mapping allows you to define which of the CRM system user fields should be updated. For this, the corresponding XML must be entered in the provided field.  
If this field remains empty, all standard fields are automatically updated.

Mapping XML

```

<?xml version="1.0" encoding="utf-8" ?>
<FieldMapping>
  <Mapping>
    <CrmAttribute>firstname</CrmAttribute>

```




## 4.3.2. Test mode

With the test mode, the program can be carried out without making changes.

When this box is ticked, the AD Synchronisation is carried out in the test mode and all possible changes are recognized but, however, not executed.

The CRM user records always remain unaltered in the test mode.

All possible changes are documented in an email as well as with tracing.

 **Settings**

**Tracing**

Tracing Level

Tracing is used to gather detailed information for debugging purposes.  
The Tracing Level setting specifies the level of detail. ▲ ▼

**Synchronization**

E-Mail recipient id

**Test mode** ☒

activate Users ☒

deactivate Users ☒

Synchronization is performed automatically.  
Test Mode: Test mode allows it, to perform the program without making any changes. The CRM user record remains unchanged.  
Activate User: This Field allows it, to turn on or off the function 'Activate CRM User'. ▲ ▼

**Field mappings**

Field mapping allows you to define which of the CRM system user fields should be updated. For this, the corresponding XML must be entered in the provided field.  
If this field remains empty, all standard fields are automatically updated. ▲ ▼

Mapping XML

### 4.3.3. Activate user

With this field, the alignment of the AD user record state and the CRM user state can be enabled or disabled in order to **activate** a user.

***This function is only available with the Enterprise version.***

When this box is ticked, this function is executed.

If, for instance, an AD user record is activated, the CRM user record will be activated as well.

*An alignment in order to deactivate an user is not possible with this function.*

If, for instance, an AD user record is deactivated, the CRM user record, however, will not be deactivated.

When this field is not ticked, this function is not executed, meaning: if an AD user record is activated, the CRM user record will not be activated.

**Settings**

**Tracing**

Tracing Level: 3

Tracing is used to gather detailed information for debugging purposes. The Tracing Level setting specifies the level of detail. ▲ ▼

**Synchronization**

E-Mail recipient id: E7415D37-8510-E311-A63D-00155D001B27

Test mode: ☒

**activate Users**: ☒ (highlighted with a red rectangle)

deactivate Users: ☒

Test Mode: Test mode allows it, to perform the program without making any changes. The CRM user record remains unchanged. ▲ ▼

Activate User: This Field allows it, to turn on or off the function 'Activate CRM User'. ▼

**Field mappings**

Field mapping allows you to define which of the CRM system user fields should be updated. For this, the corresponding XML must be entered in the provided field. If this field remains empty, all standard fields are automatically updated. ▲ ▼

Mapping XML:

```
<?xml version="1.0" encoding="utf-8" ?>
<FieldMapping>
  <Mapping>
    <CrmAttribute>firstname</CrmAttribute>
```

#### 4.3.4. Deactivate user

With this field, the alignment of the AD user record state and the CRM user state can be enabled or disabled in order to **deactivate** a user.

***This function is only available with the Enterprise version.***

When this field is ticked, this function is executed.

If, for instance, an AD user record is deactivated, the CRM user record will be deactivated as well.

*An alignment in order to activate an user is not possible with this function.*

If, for instance, an AD user record is activated, the CRM user record, however, will not be activated.

When this field is not ticked, this function is not executed, meaning: if an AD user record is deactivated, the CRM user record will not be deactivated.

The screenshot shows a 'Settings' window with a sidebar icon and the title 'Settings'. The main content area is divided into sections: 'Tracing', 'Synchronization', and 'Field mappings'.  
 - The 'Tracing' section has a 'Tracing Level' input field with the value '3'. To its right is a text box explaining that tracing is used for debugging and that the level setting specifies the level of detail.  
 - The 'Synchronization' section contains three items: 'E-Mail recipient id' with a text field containing a long alphanumeric string, 'Test mode' with a checked checkbox, and 'activate Users' with a checked checkbox. The 'deactivate Users' checkbox is also checked and is highlighted with a red rectangular border. To the right of these items is a text box explaining that the CRM user record remains unchanged and providing instructions for the 'Activate User' and 'Deactivate User' functions.  
 - The 'Field mappings' section has a text box explaining that field mapping allows defining which CRM system user fields should be updated, and that if the field remains empty, all standard fields are automatically updated. Below this is a 'Mapping XML' text area containing an XML snippet: `<?xml version="1.0" encoding="utf-8" ?>  
<FieldMapping>  
 <Mapping>  
 <CrmAttribute>firstname</CrmAttribute>`

An individual combination of the functions “Activate user” and “Deactivate user” is possible.

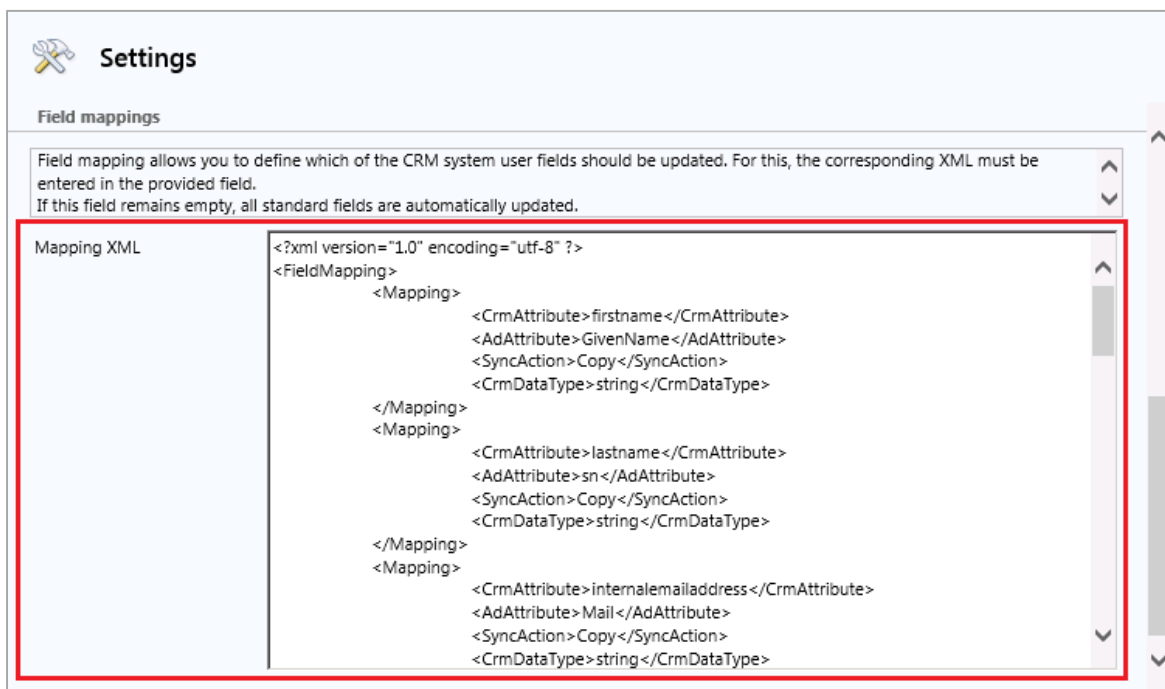
#### 4.4. Field mapping

The field mapping allows you to select the fields of the the CRM user which should be updated.

Thereto, enter the corresponding XML in the provided field.

If you leave this field empty, all standard fields are updated automatically by the provided XML. These standard fields are listed in item 4.5.1.

***A customized “Mapping XML” is only available with the Enterprise version.***



**Settings**

**Field mappings**

Field mapping allows you to define which of the CRM system user fields should be updated. For this, the corresponding XML must be entered in the provided field.  
If this field remains empty, all standard fields are automatically updated.

Mapping XML

```
<?xml version="1.0" encoding="utf-8" ?>
<FieldMapping>
  <Mapping>
    <CrmAttribute>firstname</CrmAttribute>
    <AdAttribute>GivenName</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>lastname</CrmAttribute>
    <AdAttribute>sn</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>internalemailaddress</CrmAttribute>
    <AdAttribute>Mail</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
</FieldMapping>
```

The following definitions are possible:

**Note:** all XML tags have the “case sensitive” property, therefore the user must pay attention to upper and lower case.

## The element “FieldMapping”

The element “FieldMapping” describes the field mapping XML.

Syntax:

<FieldMapping></FieldMapping>

Parent Elements		
The “FieldMapping” element has no parent elements and displays the Root element.		
Attributes		
The “FieldMapping” element has no attributes.		
Child elements		
Element name	Description	Use
Mapping	Alignment of the fields in AD and CRM	mandatory field

## The element “Mapping”

The element “Mapping” describes the alignment of the fields in the Active Directory and the CRM.

Syntax:

<Mapping></Mapping>

Parent elements		
Element name	Description	Use
FieldMapping	Root element	mandatory field
Attributs		
Property name	Description	Use
CrmAttribute	Schema name of the field in CRM	mandatory field
AdAttribute	Schema name of the field in the Active Directory	mandatory field
SyncAction	Describes the action to be carried out	mandatory field
CrmDataType	Describes the data type of the CRM field	mandatory field
Child elements		
The “Mapping” element has no child elements		

## Attributes of the “Mapping” element

With the help of the actions listed below, the corresponding fields can be updated within the Active Directory and the CRM:

Field name	Schema name in CRM	Schema name in AD	Action	CRM data type
First name	firstname	GivenName	Copy	string
Last name	lastname	sn	Copy	string
Email	internalemailaddress	Mail	Copy	string
Telephone.	address1_telephone1	TelephoneNumber	Copy	string
Mobile Phone	mobilephone	mobile	Copy	string
Fax	address1_fax	facsimileTelephoneNumber	Copy	string
Homephone	homephone	homePhone	Copy	string
Pager	address1_telephone3	pager	Copy	string
<b>Country</b>	<b>address1_country</b>	<b>c</b>	<b>ConvertCountry</b>	<b>string</b>
State or Province	address1_stateorprovince	st	Copy	string
Postal Code	address1_postalcode	postalCode	Copy	string
City	address1_city	l	Copy	string
Street	address1_line1	streetAddress	Copy	string
State	isdisabled	userAccountControl	SetState	bool

A complete XML-file containing all fields of **this** table can be found in the appendix in point 8.2.

## Special characteristic with the synchronisation of the field “country”

The Active Directory maintains the entry of the country only with its first two letters. When synchronizing the data with the CRM system, this entry must be adjusted. The action “ConvertCountry” translates the two-letter entry of the Active Directory into the complete name of the country. This name is always in English.

Example: Deutschland - DE - Germany

### 4.4.1. Fields of the standard version

If you have purchased a standard version of the AD Synchronisation, the following fields are checked and updated:

First name, Last name, Email, Telephone, Mobile Phone, Fax, Homephone, Pager, State or Province  
Postal Code, City, Street.

### 4.4.2. Fields of the Enterprise version

The Enterprise version of the AD Synchronisation can synchronise **any** available field of the Active Directory, especially new and user-defined fields, with the corresponding field of the CRM user record.

**The field entries in the settings are automatically saved when closing.**

After closing the solution “crmadsyninterface” and clearing the cache of the Internet Explorer by the shortcut Ctrl + F5 a new section “Donaubauer AG” with the entites “Configuration” and “EventLogs” is displayed in the site map.

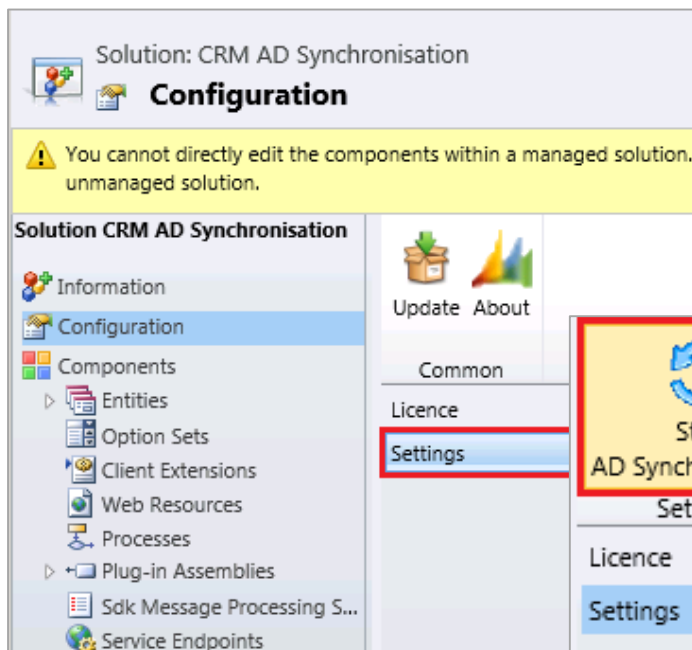
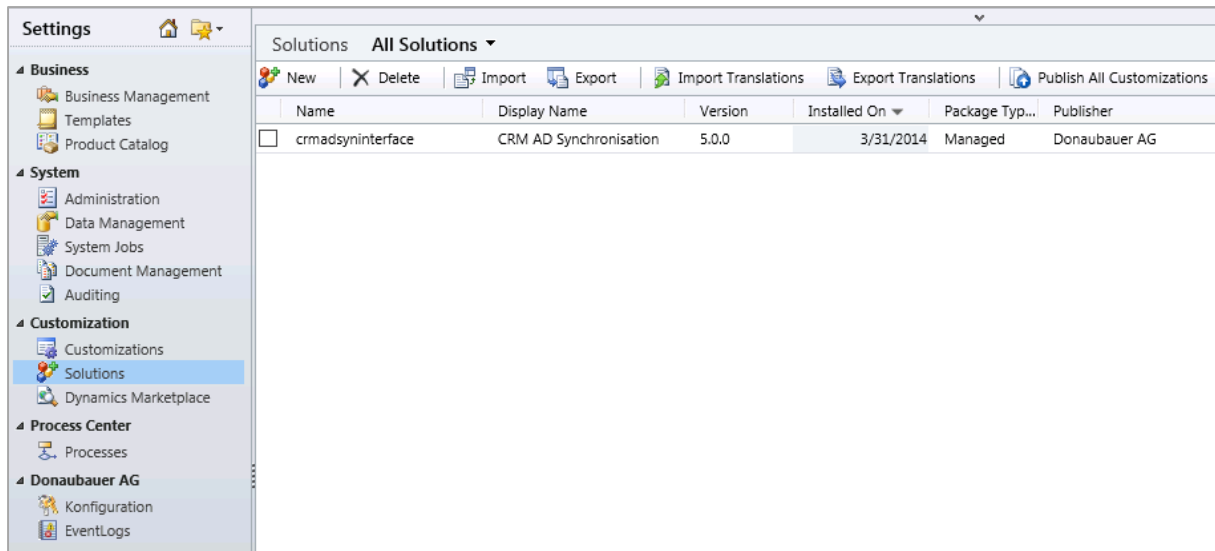
The screenshot displays the configuration interface for Donaubauer AG. The left sidebar shows a tree view with categories: Unternehmen, System, Anpassung, Prozesscenter, and Donaubauer AG. The 'Donaubauer AG' category is highlighted with a red box and contains 'Konfiguration' and 'Ereignisprotokolle'. The main area shows the 'Konfiguration' settings for 'Alle Donaubauer AG Konfigurationen', listing various CRM-AD-Synchronis... settings with checkboxes and names like ActivateUser, DeactivateUser, FieldMapping, LicenceKey, LogLevel, TestMode, TracingLevel, and UserForEmail.

The “Configuration” entity lists certain values. Here, you can, for instance, look up the current license key. Furthermore, the values changed in the “settings” are displayed.

The “EventLog” entity doesn’t shows any entries yet. If any errors occur during the work with the AD Synchronisation, they will be documented in this tool.

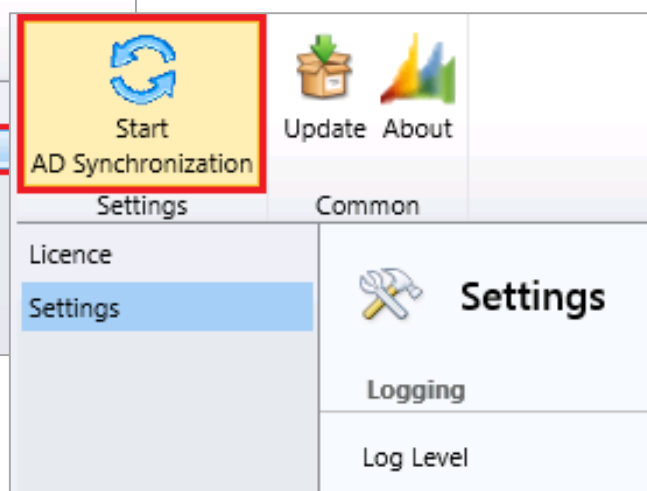
## 5. Use of the Active Directory Synchronisation

To start the AD Synchronisation, go to “Settings” in the Sitemap in the navigation area of your Microsoft Dynamics CRM and activate the entity “Solutions” in the left application area.



Open the solution “crmadsyninterface” by double-clicking and go to the configuration page. Then, go to “Settings” in the SiteMap.

In the next window click “Start AD Synchronization”.





When clicking the button, a bulk delete job is generated and subsequently opens in a new window.

Bulk Delete Operation: Crm AD Synchronization

**Information**

General

Name: Crm AD Synchronization Owner: SYSTEM

Status Reason: Waiting

Options

Notify Me When Task Completes: ☐ Yes ☒ No Recurrence: ☐ No ☒ Yes

Also Notify: Next Run: 4/1/2014

Properties

Created By: SYSTEM Created On: 3/31/2014 1:40 PM

Modified By: SYSTEM Modified On: 3/31/2014 1:40 PM

Selected Query: Konfiguration

Name Equals 9F0D90D0-A74D-4947-BA30-FD157467822D

Status: Suspended

This bulk delete job browses the configuration entity for a record with a specific name.  
(A record with his name **must not** exist!)

Since there is no such record, nothing is deleted by the bulk delete job.  
When the bulk delete job, however, retrieves the configuration entity and browses for the record, a plugin, which carries out the **AD Synchronisation**, starts.

This means: **this system order is equivalent to the AD Synchronisation!**

You can perform your desired settings for the AD Synchronisation in the bulk delete process information window.

To do so, click “Actions” in the upper toolbar and select “Modify Recurrence”.

Bulk Delete Operation: Crm AD Synchronization

**Information**

General

Name: Crm AD Synchronization Owner: SYSTEM

Status Reason: Waiting

Options

Notify Me When Task Completes: ☐ Yes ☒ No Recurrence: ☐ No ☒ Yes

Also Notify: Next Run: 4/1/2014

Properties

Created By: SYSTEM Created On: 3/31/2014 1:40 PM

Modified By: SYSTEM Modified On: 3/31/2014 1:40 PM

Selected Query: Konfiguration

Name Equals 9F0D90D0-A74D-4947-BA30-FD157467822D

Status: Suspended

When selecting “**Never**”, the bulk delete job will never be carried out.

The screenshot shows the 'Modify Recurrence -- Webpage Dialog' window. The title bar reads 'Modify Recurrence -- Webpage Dialog'. The main heading is 'Modify Recurrence' with the subtitle 'Modify the schedule for selected bulk deletion jobs.' Under the section 'Run this bulk deletion system job:', the 'Never' radio button is selected and highlighted with a red rectangle. Other options include 'Today at:' (set to 2:00 PM) and 'Schedule recurrence' (set to 1 day, 3:00 AM start time). 'OK' and 'Cancel' buttons are at the bottom right.

When selecting “**Today at:**” you can set a point of time to carry out the AD Synchronisation.

You can either choose a time from the dropdown menu or enter a time in the field yourself.

The screenshot shows the 'Modify Recurrence -- Webpage Dialog' window. The 'Today at:' radio button is selected and highlighted with a red rectangle. A dropdown menu is open next to the '2:00 PM' field, showing a list of times: 2:00 PM, 2:30 PM, 3:00 PM, 3:30 PM, 4:00 PM, and 4:30 PM. The 'OK' and 'Cancel' buttons are at the bottom right.

When selecting “**Schedule recurrence**” you can set individual options for the repetition of a system order.

#### Run the job after every:

This selection defines the time interval in which the order will be repeated.

Here, you can enter a value between “1” and “365” days. When you enter “1”, the AD Synchronisation will be carried out **one time** every day. When you, for example, set the value to “30”, the order will be carried out **one time** every 30 days.

The screenshot shows the 'Modify Recurrence -- Webpage Dialog' window. The 'Schedule recurrence' radio button is selected and highlighted with a red rectangle. A dropdown menu is open next to the '1' field under 'Run the job after every:', showing a list of values: 1, 7, 30, 90, and 180. The 'OK' and 'Cancel' buttons are at the bottom right.

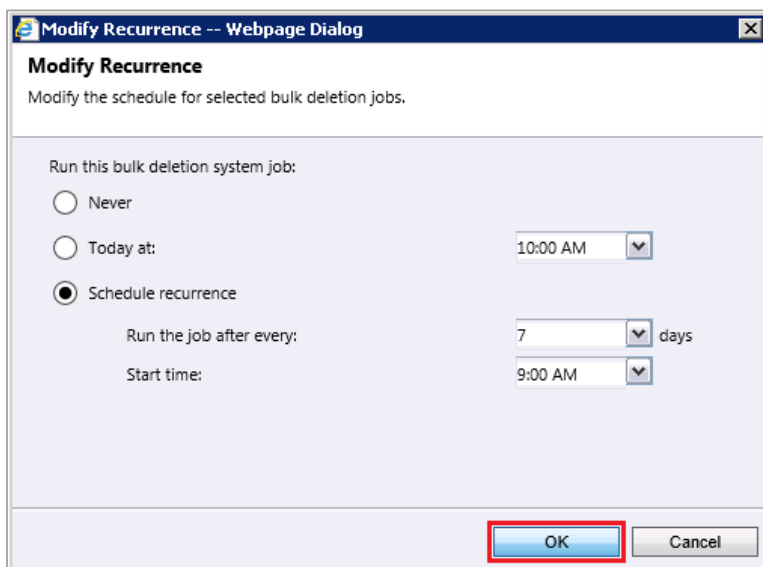
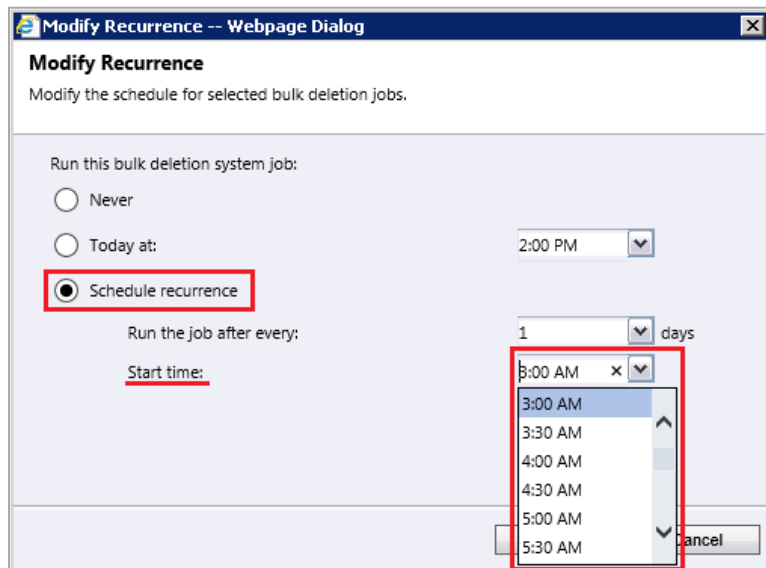
**Start time:**

After choosing the time interval to carry out the system order, you have to select at which time of the respective day it should start.

Again, you can either choose a given time from the dropdown menu or enter a time yourself.

**Important:**

If you do not change the starting time, the AD Synchronisation won't start at the respective time until the next day.



When all settings are carried out, please confirm the changes with the "OK" button.

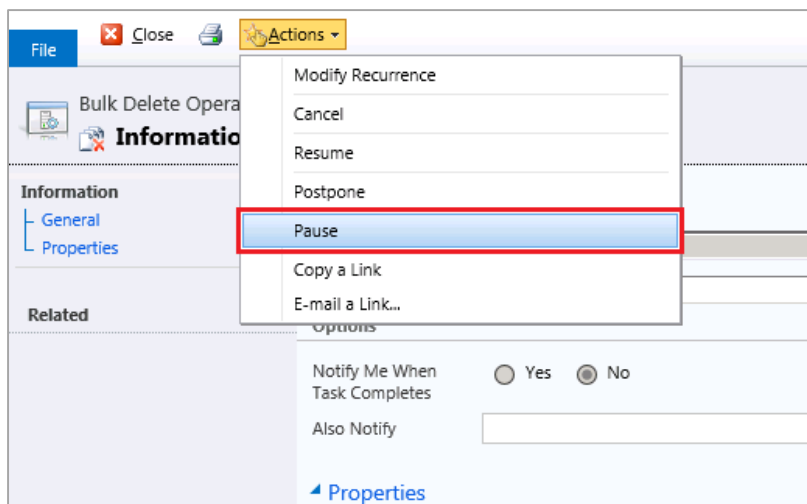
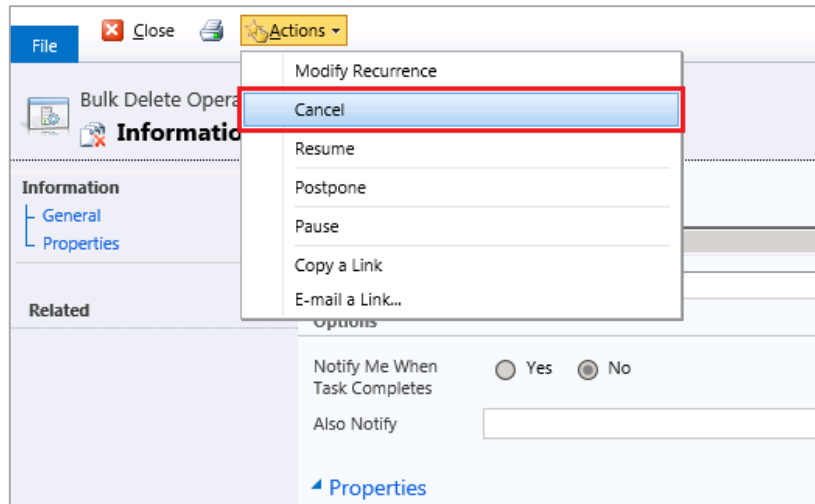
Your Active Directory Synchronisation will now be carried out with your desired settings.

When changes are detected after carrying out the AD Synchronisation, you will receive a notification email.

The “Actions” dropdown menu provides you with additional settings.

With the menu item “**Cancel**” you can stop the current system order and therefore prevent any further carrying out of the AD Synchronisation.

To do so, click “Cancel” and confirm the following dialog with “OK”.



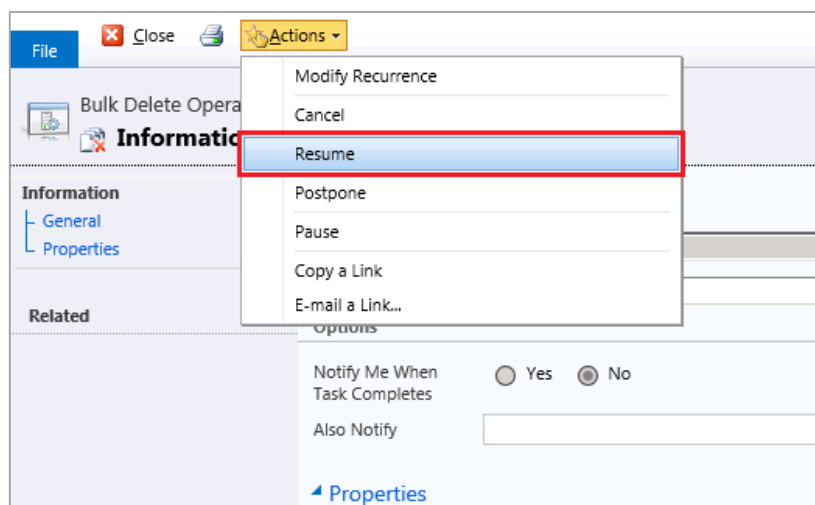
The “**Pause**” function pauses the AD Synchronisation.

The AD Synchronisation is paused until you decide to continue the system order.

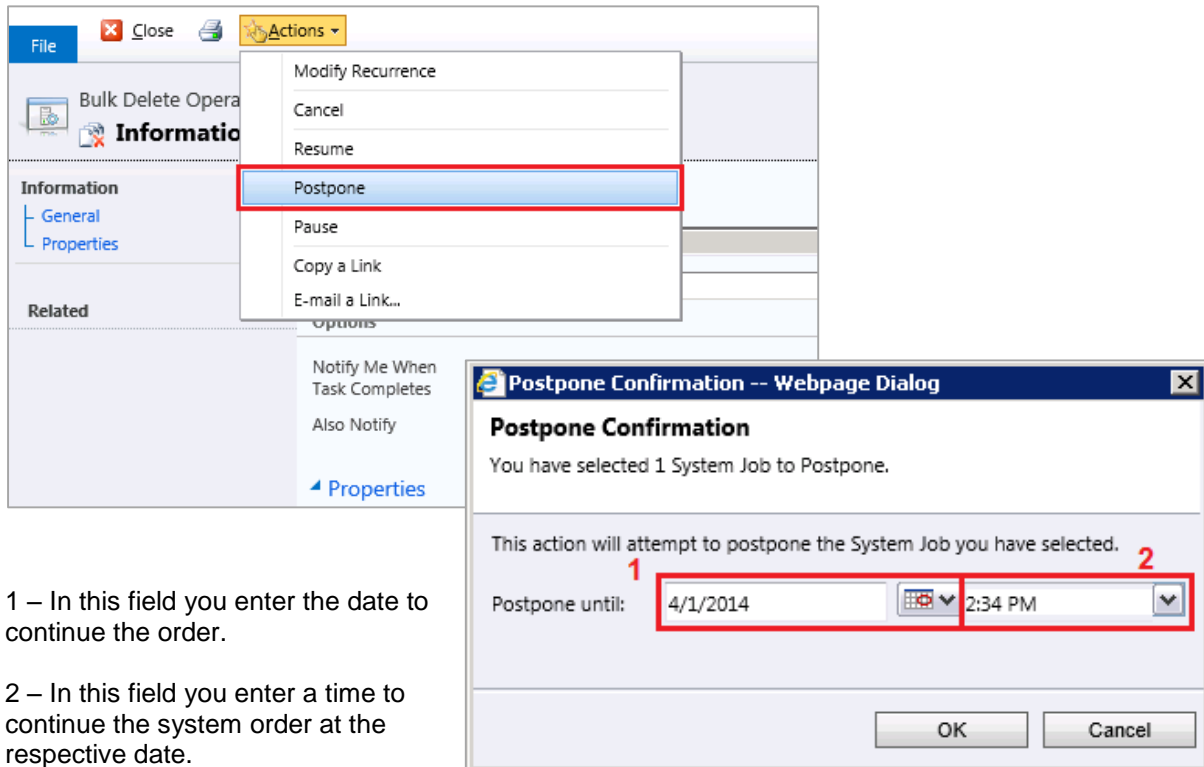
To do so, click “Pause” and confirm the following dialog with “OK”.

In order to continue the AD Synchronisation, please click the “Resume” button.

To do so, click “Resume” and confirm the following dialog with “OK”.



As an alternative you can use the “Postpone” function in order to pause the system order.  
Here, the AD Synchronisation is stopped and will be continued to a later point of time. This point of time is determined by the user itself after clicking the respective button.



1 – In this field you enter the date to continue the order.

2 – In this field you enter a time to continue the system order at the respective date.

Now, confirm this dialog with the “OK” button.

## 5.1. Email notification

By entering the email recipient ID in the configuration, the corresponding CRM User will receive a notification email after every successful performance of the AD Synchronisation. This email, however, is only sent when changes are available.

The language of the email is English. If the user's CRM is German, the email language will be German as well. Any other languages will use English.

The notification email serves as information about changes that are available or were made.

The email contains the following information:

- Number of detected AD users
- Number of detected CRM users

About the respective changes:

- o Full name of the affected CRM user
- o Field name
- o Old field data
- o New field data

Subject	AD Synchronisation 2014-03-31 14:45:13 CRM:0003142
Regarding	
<div>Number of Active Directory User: 32 Number of CRM User: 7 ----- CRM User: Der Test CRM Field Name: lastname Old Data: Test New Data: Tester</div>	

### Please note:

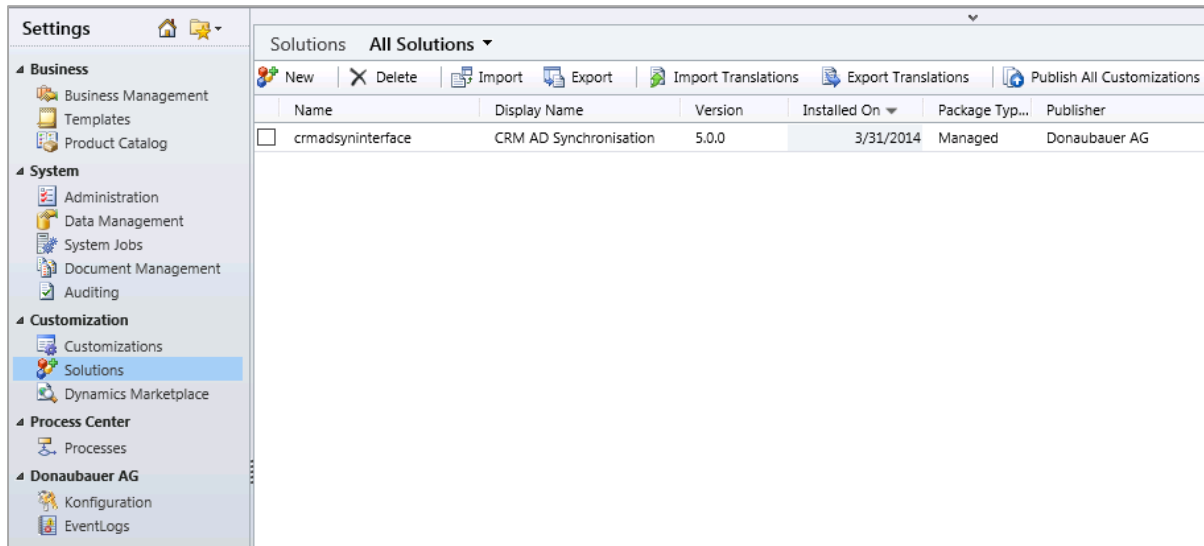
If the AD Synchronisation is carried out in the test mode, the email contains only the changes available. The CRM data were not automatically updated.

If you use the test mode, you will find closer information about it in the email.

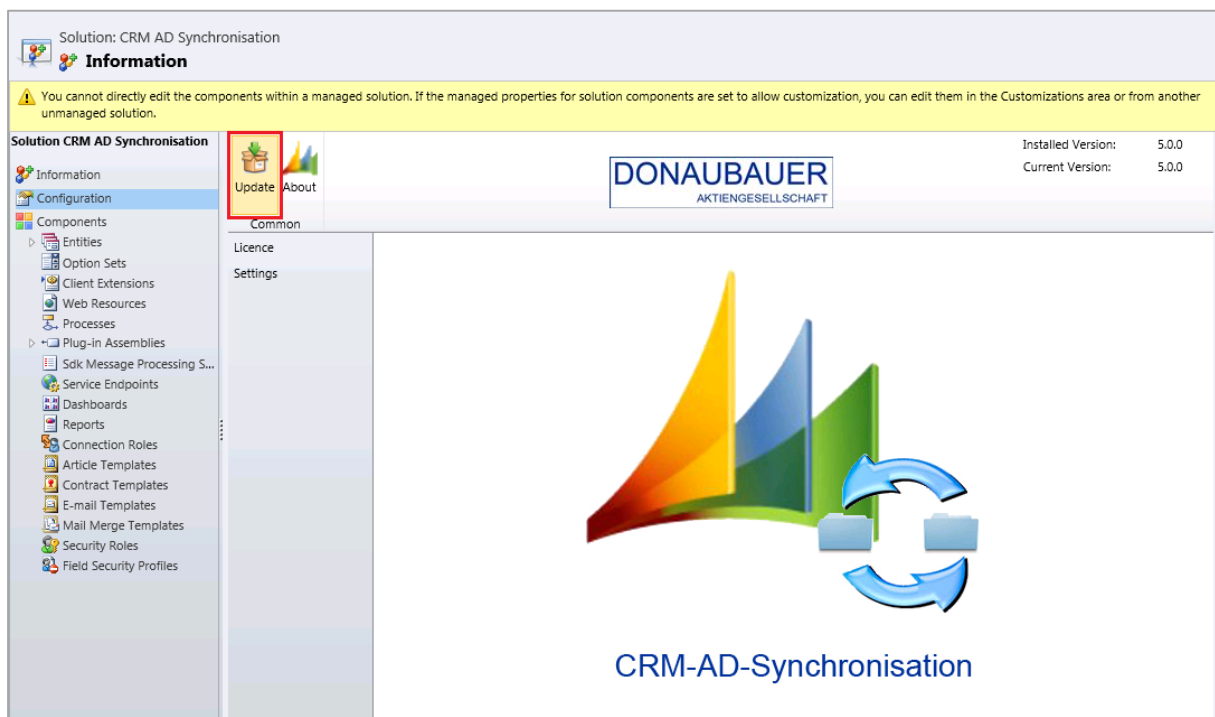
## 6. Update

When a new update of our Active Directory Synchronisation for Microsoft Dynamics CRM is available, you can install it directly. For this, please process as follows.

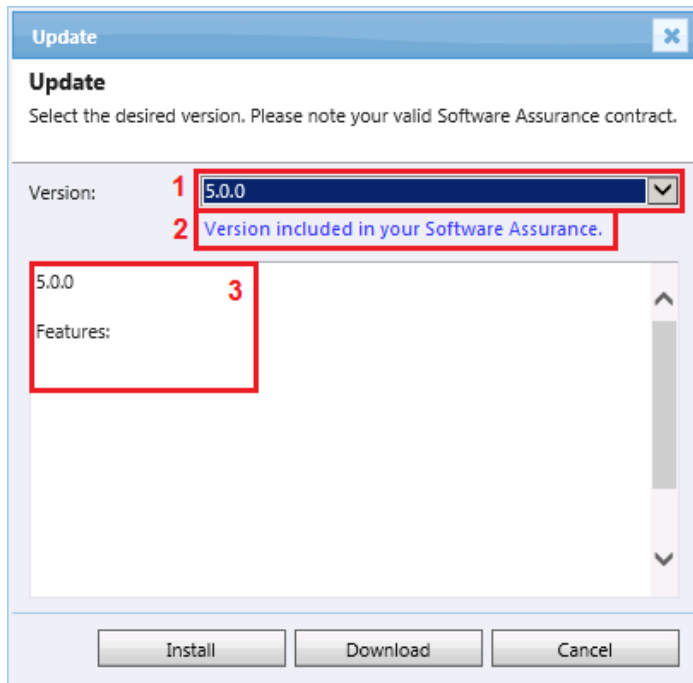
Just as for installing the AD Synchronisation, go in the sitemap of the navigation area of your Microsoft Dynamics CRM system, go to “Settings”, then activate the “Solutions” entity in the left application area and double click on “crmadsyninterface”.



Just as for installing the interface, the following window opens up: in the upper right corner you can find information about the current version installed and the latest version of the AD Synchronisation interface.



If your currently installed version is not the latest version of the interface, you can carry out an update by clicking on the “Update” button. The following window appears:



At first, you can view the versions to be downloaded.

Now, you can check if the displayed version was published within your purchased software assurance, allowing you to download this version.

The third point of this window is a detailed description of new features and bugfixes of the previous version.

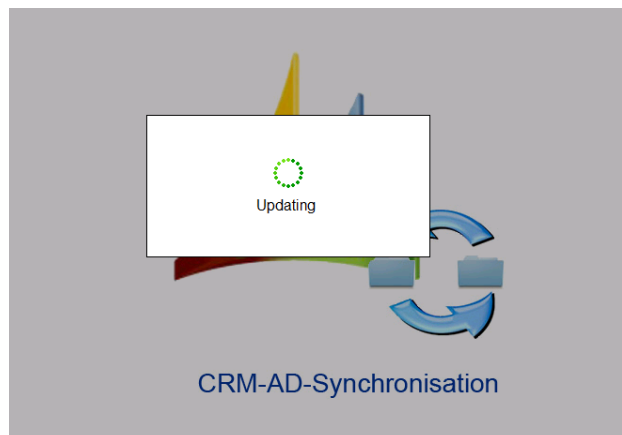
(Our screenshot doesn't list anything in the “Features” item, since 5.0.0 is the standard version.)

Now you may decide whether you want to directly install the new version or download the solution and install it manually at a later time.

The “Install” button directly imports the new version. You can use it shortly afterwards.

By clicking the “Download” button you can download the latest version as a zip file.

Just in case the update should not be carried out, the routine can be stopped by the “Cancel” button.



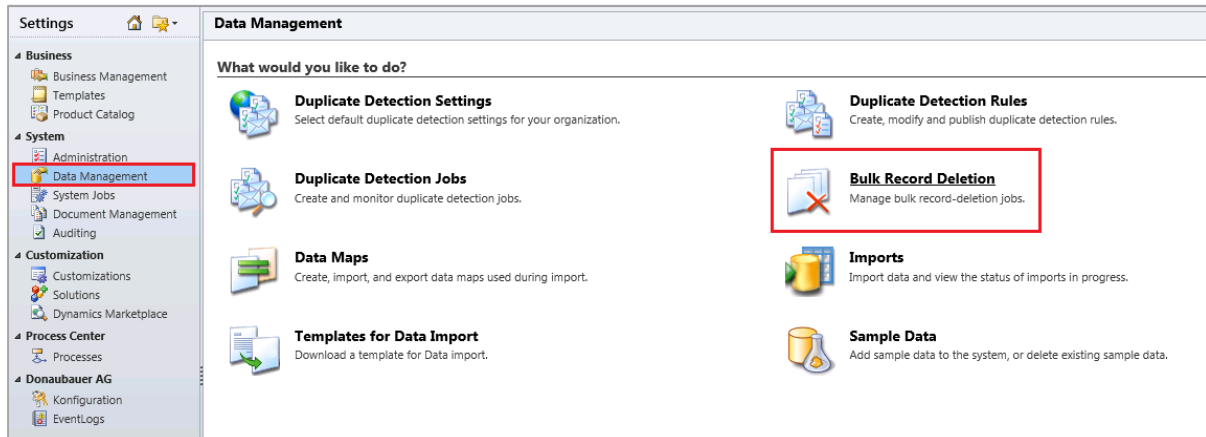


## 7. Uninstalling the Active Directory Synchronisation

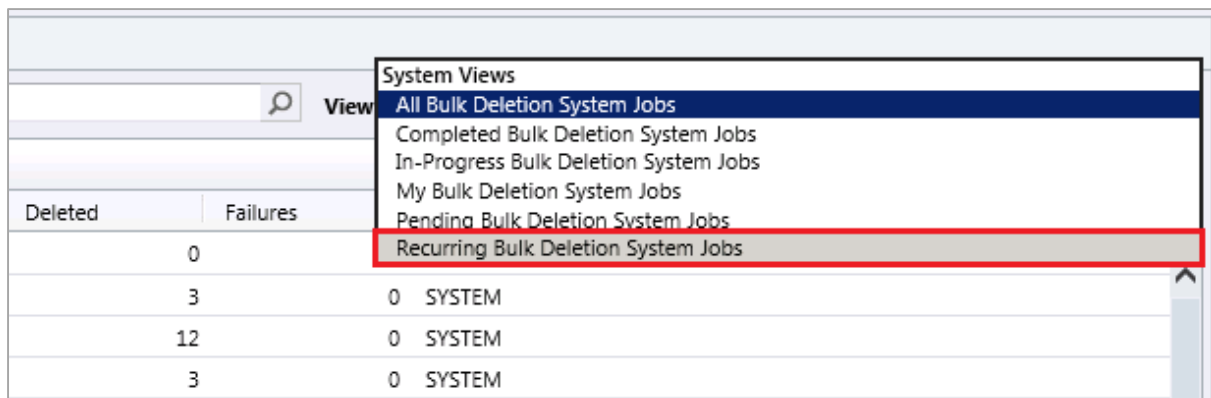
In order to uninstall the interface, please proceed as follows.

Firstly, terminate all AD Synchronisation system orders.

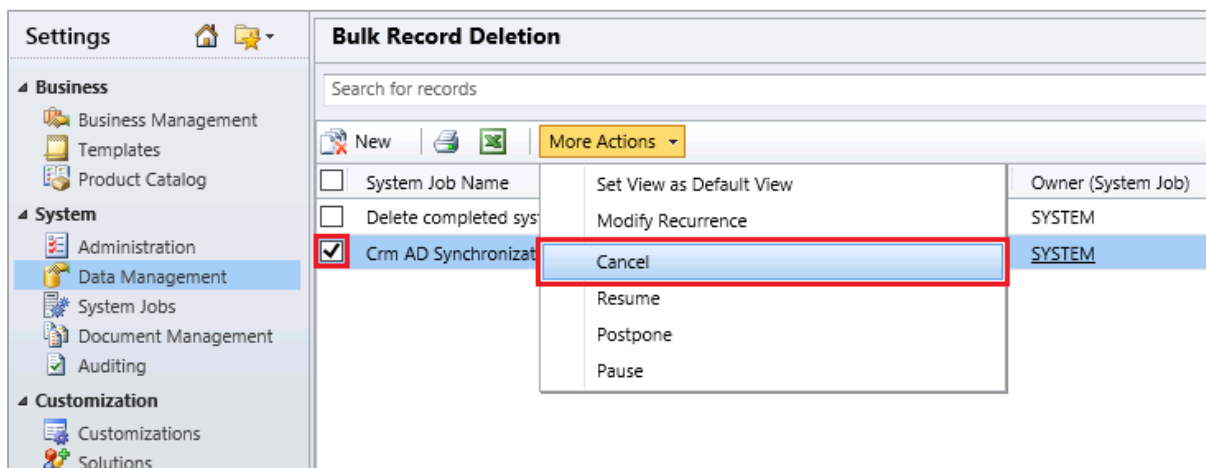
To do so, go to “Bulk Record Deletion” in the “Data Management” entity.



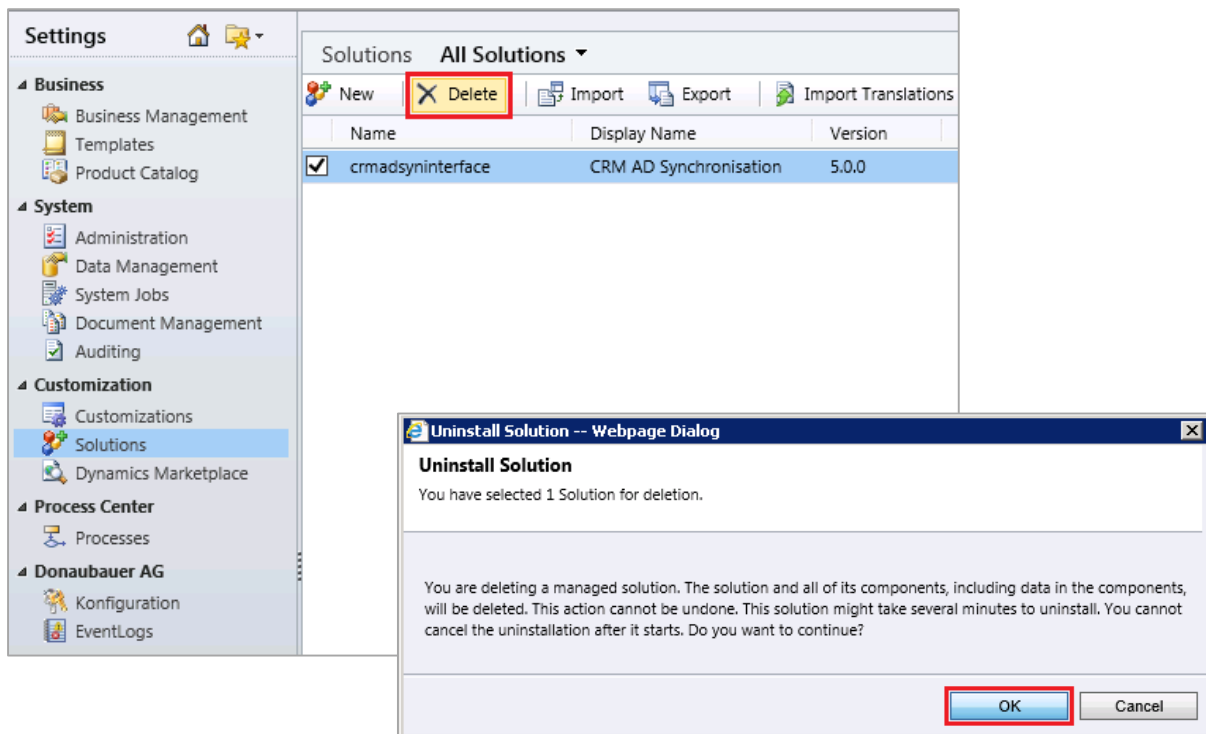
Now, select “Recurring Bulk Deletion System Jobs” in order to view a list of all this orders.



Select all “Crm AD Synchronisation” system order and confirm it by clicking “Cancel” in the “More Actions” section.

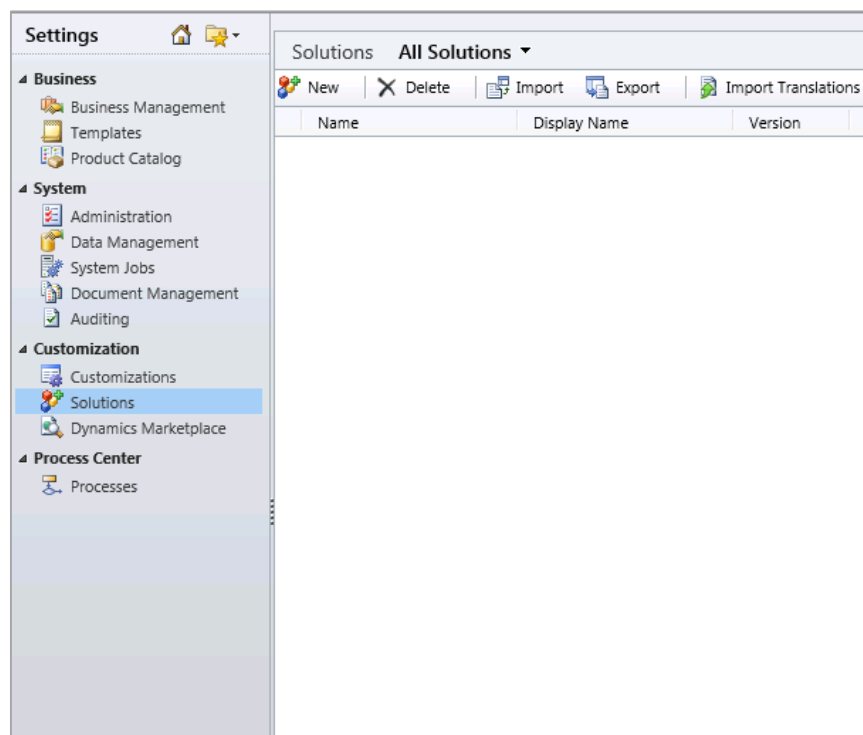


Subsequently, select the solution “crmadsyninterface” in the “Solutions” entity and remove them with the “Delete” button in the toolbar.



Confirm with the “OK” button and the solution is being deleted.

After rebooting your system (Ctrl + F5), the section “Donaubauer AG” with the entities “Configuration” and “EventLog” disappeared in the left application area.



**Your Active Directory Synchronisation is now entirely uninstalled.**

## 8. Appendix: Examples for the mapping XML

### 8.1. Standard template of the field mapping XML

#### Template of the field mapping XML:

(This XML is used with the standard versions of the AD Synchronisation.)

```
<?xml version="1.0" encoding="utf-8" ?>
<FieldMapping>
  <Mapping>
    <CrmAttribute>firstname</CrmAttribute>
    <AdAttribute>GivenName</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>lastname</CrmAttribute>
    <AdAttribute>sn</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>internalemailaddress</CrmAttribute>
    <AdAttribute>Mail</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>address1_telephone1</CrmAttribute>
    <AdAttribute>TelephoneNumber</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>mobilephone</CrmAttribute>
    <AdAttribute>mobile</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>address1_fax</CrmAttribute>
    <AdAttribute>facsimileTelephoneNumber</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>homephone</CrmAttribute>
    <AdAttribute>homePhone</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>address1_telephone3</CrmAttribute>
    <AdAttribute>pager</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>address1_stateorprovince</CrmAttribute>
    <AdAttribute>st</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
  <Mapping>
    <CrmAttribute>address1_postalcode</CrmAttribute>
    <AdAttribute>postalCode</AdAttribute>
    <SyncAction>Copy</SyncAction>
    <CrmDataType>string</CrmDataType>
  </Mapping>
</FieldMapping>
```

```

        <CrmAttribute>address1_city</CrmAttribute>
        <AdAttribute>I</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>address1_line1</CrmAttribute>
        <AdAttribute>streetAddress</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
</FieldMapping>

```

## 8.2. Enterprise template of the field mapping XML

### Template of the field mapping XML: (Fields of the table in item 4.4)

```

<?xml version="1.0" encoding="utf-8" ?>
<FieldMapping>
    <Mapping>
        <CrmAttribute>firstname</CrmAttribute>
        <AdAttribute>GivenName</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>lastname</CrmAttribute>
        <AdAttribute>sn</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>internalemailaddress</CrmAttribute>
        <AdAttribute>Mail</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>address1_telephone1</CrmAttribute>
        <AdAttribute>TelephoneNumber</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>mobilephone</CrmAttribute>
        <AdAttribute>mobile</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>address1_fax</CrmAttribute>
        <AdAttribute>facsimileTelephoneNumber</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>homephone</CrmAttribute>
        <AdAttribute>homePhone</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
    <Mapping>
        <CrmAttribute>address1_telephone3</CrmAttribute>
        <AdAttribute>pager</AdAttribute>
        <SyncAction>Copy</SyncAction>
        <CrmDataType>string</CrmDataType>
    </Mapping>
</FieldMapping>

```

```
<CrmAttribute>address1_country</CrmAttribute>
<AdAttribute>c</AdAttribute>
<SyncAction>ConvertCountry</SyncAction>
<CrmDataType>string</CrmDataType>
</Mapping>
<Mapping>
  <CrmAttribute>address1_stateorprovince</CrmAttribute>
  <AdAttribute>st</AdAttribute>
  <SyncAction>Copy</SyncAction>
  <CrmDataType>string</CrmDataType>
</Mapping>
<Mapping>
  <CrmAttribute>address1_postalcode</CrmAttribute>
  <AdAttribute>postalCode</AdAttribute>
  <SyncAction>Copy</SyncAction>
  <CrmDataType>string</CrmDataType>
</Mapping>
<Mapping>
  <CrmAttribute>address1_city</CrmAttribute>
  <AdAttribute>l</AdAttribute>
  <SyncAction>Copy</SyncAction>
  <CrmDataType>string</CrmDataType>
</Mapping>
<Mapping>
  <CrmAttribute>address1_line1</CrmAttribute>
  <AdAttribute>streetAddress</AdAttribute>
  <SyncAction>Copy</SyncAction>
  <CrmDataType>string</CrmDataType>
</Mapping>
<Mapping>
  <CrmAttribute>isdisabled</CrmAttribute>
  <AdAttribute>userAccountControl</AdAttribute>
  <SyncAction>SetState</SyncAction>
  <CrmDataType>bool</CrmDataType>
</Mapping>
</FieldMapping>
```

Should you have any questions regarding the AD Synchronisation interface or need further support, do not hesitate to contact us.

## DONAUBAUER

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Informationen about the AD Synchronisation interface: <http://www.donaubauer.com/de/#!/ADsync>

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